



XRT

Xref (Cross-Reference)
Recommendation Team



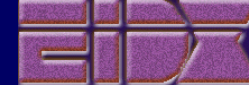
Methodology

- } Identify which standards to xref
- } Identify and prioritize messages to be xref'd
- } Find out if anyone else has already done this
- } Identify business process area on conference agenda (so that content experts can be recruited)
- } Do analysis of the business process (e.g. like we did with PO) – define and scope; object-oriented approach



Initial Build

- } Identify which documents need cross-references
 - } Standard PO
 - } Blanket PO
 - } Standard PO extensions
- } Perform analysis of business process if this has not already been done.
 - } For an example, see PO_Analysis.ppt
- } Initial build of worksheet from standards-neutral list of business document contents (example next slide)
 - } Include a column for EIDX's standards-neutral requirements designator



Standard PO Contents

INCLUDED IN STANDARD PO

- } PO Number (Document Number, whatever) – **mandatory**
- } PO Date – **mandatory**
- } Document purpose code – **mandatory**
- } Order subtype – **mandatory**
- } Buyer identification – **mandatory**
- } Seller identification – **mandatory**
- } Contact names – *optional*
- } Ship-To – **mandatory**
- } Bill-To – **mandatory**
- } Item (Part Number) – **mandatory**
- } Item Number (line number) – **mandatory**
- } Line item Quantity – **mandatory**
- } Quantity Unit of Measure – **mandatory**
- } Price – **mandatory**
- } Price Unit of Measure – **mandatory**
- } Currency Code – **mandatory**
- } Tax Exemption Status – **mandatory**
- } Tax Exemption ID (e.g. VAT number) – *optional*
- } Price basis – **mandatory**
- } Contract number – *optional*
- } Delivery quote number – *optional*
- } Price quote number – *optional*
- } Ship instructions – *optional*
- } Delivery Date – *optional*

NOT IN A STANDARD PO

- Release Numbers
- Acknowledgment Type identifier *
- Invoice Type identifier *
- Physical addresses*
- Category/commodity type identifiers *
- Part descriptions*
- Exchange rates
- Government contract numbers and priority ratings (non standard in our industry)
- FOB and other transportation terms *
- Allowances and other special charges
- Payment methods*
- Terms of sale *
- Requirements for special paperwork (such as certificates of conformance) *
- Special handling instructions*
- Free-form text
- Identification of third parties and their part numbers, order numbers etc. (other than via a pre-established ship-to code for drop-ship).
- Subline items (options)
- Delivery schedule numbers

* If needed, should be pre-established as part of account setup



Capture Supporting Info

- } Many notes will have been captured during business process analysis (example next slide)
 - } Process notes
 - } Element usage notes

- } Many notes are already captured in previous guidelines and supporting documents
 - } Many may already be part of clickable business models supporting documentation, some are still in Word documents
 - } Note location of such notes and any changes/additions; pointers to supporting process and usage notes will be put in spreadsheet



Standard PO Contents

} Ship-To – mandatory

- } Ship-to code and ship-to name
- } No physical addresses – cross-references between addresses should have been pre-established.
- } To be decided: Should ship-to be only at header (only one ship-to per PO)? More about this later – applies to more than just ship-to

} Bill-To – mandatory

- } Ship-to code and ship-to name
- } No physical addresses – cross-references between addresses should have been pre-established.
- } Payment method should be pre-established; no payment info, terms, etc. needed for ‘standard’ PO

Example from
PO_Analysis.ppt



X12 Elements

- } Add/update X12 elements from v. 4010 guidelines
 - } Verify element numbers
 - } Update/verify attributes, code values
 - } Add elements required by standard but not in 'standards-neutral' list
 - *Only the required elements; other non-required elements that are not on the spreadsheet will be added later*
 - Select "neutral" data element name for xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Update supporting documentation, if it exists, and convert to web display (if not already converted), or Collect "gap analysis" identification and resolution (if any) to add to web supporting documentation



Annotation in the Spreadsheet

Indicate elements for which supporting info exists ... may need to document location of info on separate spreadsheet or notes document

Highlight gaps ...

Yellow = gap for which a workaround may exist

Red = possible show stopper

Microsoft Excel - element_extract.xls

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D:\EIDX\CrossReferences\element_extract.xls

	A	B	C	D	E	F	G	H	I	J	K
	EIDX Name*	Supp	EIDX	Doc	X12	Description	Rqmt	DE	Code	RN Element	RN
	Description	Info	Reqmt	Level	SeqEl	(Type, Min/Max)	Status	#	Value	data type	Code
1	Purchase Order Date	Yes	Required	1-Hdr	BEG05	PO Date (DT 8/8)	M	323	--	thisDocumentGenerationDateTime	
11										DateTimeStamp	
12											
13	Document Status		Required	1-Hdr	BEG01	Transaction Set Purpose (ID 2/2)	M	353	--	GlobalDocumentFunctionCode, appears at 0-Msg level, not 1:1 match to other standards, assume "Original" (vs. Confirming)	Request
14	Purchase Order Type	Yes	Required	1-Hdr	BEG02	Purchase Order Type (ID 2/2)	M	354	--	GlobalPurchaseOrderTypeCode Can't specify both "Standard" and "Consigned"	Standard's "Consigned" Order'
15	Purchase Order Sub-Type: Drop Ship Indicator		Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "DS"	Optional			IsDropShipAffirmationIndicator	Yes' or 'No
16	Purchase Order Sub-Type: Consignment Indicator		Required	1-Hdr						GlobalPurchaseOrderTypeCode Can't specify both "Standard" and "Consigned"	Standard's "Consigned" Order'
17	Buyer Identification	Yes	Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "BY"	Optional			fromRole.PartnerRoleDescription - see Party Identification (Common Elements)	
18	Buyer Contact Information	Yes	Advised	1-Hdr	N1.PER	See Contact Information (Common Elements). Use	Optional			fromRole.PartnerRoleDescription - see Contact Information (Common	

Ready

Start

12:58 PM



Common Elements

- } As cross-reference continues to build, it will be evident that many elements are common to all document types
 - } Party Identification Info
 - } Address
 - } Contact Info
- } Capture common elements in a separate worksheet
- } On worksheet for specific document, reference the common element(s) and identify any specifics for the document (example next slide)



Referencing Common Elements

Microsoft Excel - element_extract.xls

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Go D:\EIDX\CrossReferences\element_extract.xls

	A	B	C	D	E	F	G	H	I	J	K
	EIDX Name*	Supp	EIDX	Doc	X12	Description	Rqmt	DE	Code	RN Element	RN
	Description	Info	Reqmt	Level	SeqEl	(Type, Min/Max)	Status	#	Value	.dataType	Code
1	Buyer Identification	Yes	Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "BY"	Optional			fromRole.PartnerRoleDescription - see Party Identification (Common Elements)	
18	Buyer Contact Information	Yes	Advised	1-Hdr	N1	See Contact Information (Common Elements). Use PER where PER01 = "BD" contained within N1 loop where N101 = "BY"	Optional			fromRole.PartnerDescription - see Contact Information (Common Elements)	
19	Seller Identification	Yes	Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "SE"	Optional			toRole.PartnerRoleDescription - see Party Identification (Common Elements)	
20	Seller Contact Information	Yes	Optional	1-Hdr	N1	See Contact Information (Common Elements). Use PER where PER01 = "CW" contained within N1 loop where N101 = "SE"	Optional			toRole.PartnerDescription - see Contact Information (Common Elements)	
21	Ship-To Address	Yes	Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "ST"	Optional			See Party Identification (Common Elements). Use shipTo.PartnerRoleDescription. Note: Mandatory at all levels, so header always overridden even though mandatory	
22	Bill-To Address	Yes	Required	1-Hdr	N1	See Party Identification (Common Elements). Use N1 loop where N101 = "BT"	Optional			See Party Identification (Common Elements). Use billTo.PartnerRoleDescription	
23	Currency		Required at Header or	1-Hdr	CUR02	Currency Code (ID 3/3)		100	ISO Code	GlobalCurrencyCode	
24											

Common Elements PO - Standard Reference

Ready

Start

1:24 PM



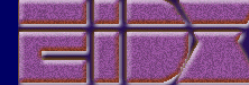
EDIFACT Elements

- } Add/Update EDIFACT elements from EDIFICE D.97A guidelines
 - } Verify element numbers
 - } Update/verify attributes, code values
 - } Add elements required by standard but not in 'standards-neutral' list or captured during X12 cross-referencing
 - *Only the required elements; other non-required elements that are not on the spreadsheet will be added later*
 - Select "neutral" data element name for xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Update supporting documentation, if it exists, and convert to web display (if not already converted), or collect "gap analysis" identification and resolution (if any) to add to web supporting documentation



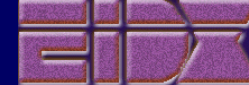
OAGIS Elements

- } Add/Update OAGIS elements from “current” version of standard
 - } Verify element names
 - } Update/verify attributes, code values
 - } Add elements required by standard but not in ‘standards–neutral’ list or captured during previous cross–referencing
 - *Only the required elements; other non–required elements that are not on the spreadsheet will be added later*
 - Select “neutral” data element name for xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Continue adding gap analysis identification and resolution to web supporting documentation



RosettaNet Elements

- } Add/Update RosettaNet references from “current” version of standard
 - } Verify element names
 - } Update/verify attributes, code values
 - } Add elements required by standard but not in ‘standards–neutral’ list or captured during previous cross–referencing
 - *Only the required elements; other non–required elements that are not on the spreadsheet will be added later*
 - Select “neutral” data element name for xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Continue adding gap analysis identification and resolution to web supporting documentation



Other Standards

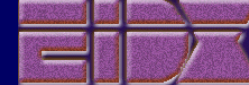
- } Add/Update any other targeted standards references from “current” version of the standard
 - } UCC, xCBL, cXML, UCC-EAN
 - } Verify element names/numbers
 - } Update/verify attributes, code values
 - } Add elements required by standard but not in ‘standards-neutral’ list or captured during previous cross-referencing
 - Select “neutral” data element name for Xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Continue adding gap analysis identification and resolution to web supporting documentation



Additional Elements

- } Add/update additional X12 references from v. 4010 guidelines
 - } Could do this first, or do evaluation of related documents first (later slide)
 - } On a new worksheet, list all other elements in the guidelines, not in 'standards-neutral' list, and not mandatory in the standard
 - Select "neutral" data element name for xref spreadsheet
 - Initial identification of what values should be used for such elements
 - Capture information about why those elements are in the guideline. What different business process and/or special document type are those elements associated with?
 - Example: Release number used in Purchase Order in non-forecast-based Blanket Purchase Order process

Continued on next slide ...

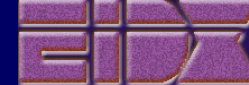


Additional Elements – Con't

- } Add/update additional X12 references, Con't
 - Update supporting documentation, if it exists, and convert to web display (if not already converted), or Collect “gap analysis” identification and resolution (if any) to add to web supporting documentation
- } Add/update additional elements from EDIFACT, OAGIS, RosettaNet, and any other targeted standards

Evaluate Related Documents

- } For example, after looking at “standard PO”, evaluate other PO types (see next slide)
 - } Is the other PO type supported by adding one or two optional elements?
 - } Additional element could be added as an “extension” to standard PO, or as just one more optional element
 - If there are only a very few optional elements needed to support all other PO types, could add those optional elements to the “standard PO”
 - If there are many optional elements, it is preferable to document those as extensions to the standard PO or to “core components” (slides following list of PO types); constraints indicate when those additional elements are used
 - Example: If PO type is Consignment Order, then *<element x>* is mandatory



Purchase Orders – Where we are so far

Example from
PO_Analysis.ppt

Identified as Standard

Catalog Order
Confirming Order
Contract Order
Direct Procurement PO
Drop-Ship Order – routinely used
ship-to address
Standard Configuration Order
Spot-buy PO (but not all spot-
buy Pos)

Blanket PO Types

Still need to determine if
some are synonyms

Blanket PO
Evergreen Order
Standing Purchase Order

Warranty/Service

Still need to determine if
some are synonyms

Job Order
Service Order
Repair Order
Replacement Order
Warranty Order
Work Order (for services)

Synonyms/legal terms

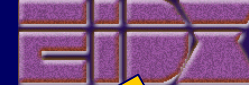
Could apply to “standard” or
some of the other order types

Customer Order
Intra-company Order
Sales Order
Standalone PO
Trade Order

Other categorized

Some could be “standard”

Bill-only PO
Build-to-Order (BTO)
Configure-to-Order (CTO)
Consignment Order
Drop-Ship Order – non-routine ship-to
address
Government Order
Internal Order
New customer or infrequent customer
(not an established account)
Spot-buy PO
Requisition PO
Subcontract Order
Work Order for MRP
Replenishment Order



“Core” vs. “Standard”

Example from
PO_Analysis.ppt

- } “Standard” purchase order and “core components” for a purchase order are not the same thing, although there is a pretty big overlap.
 - } Is the overlap big enough that we build extensions from standard PO, or do we build PO “core components” and then add elements needed for standard PO as an extension to the core?
 - } Do “discrete” purchase order (one-time commitment) and “blanket” purchase order (long-term commitment) have a common core, given that a blanket order may have a fundamentally different structure than a discrete purchase order at the time of creation, are both extensions of a common core, or do we need separate “core components” for each?

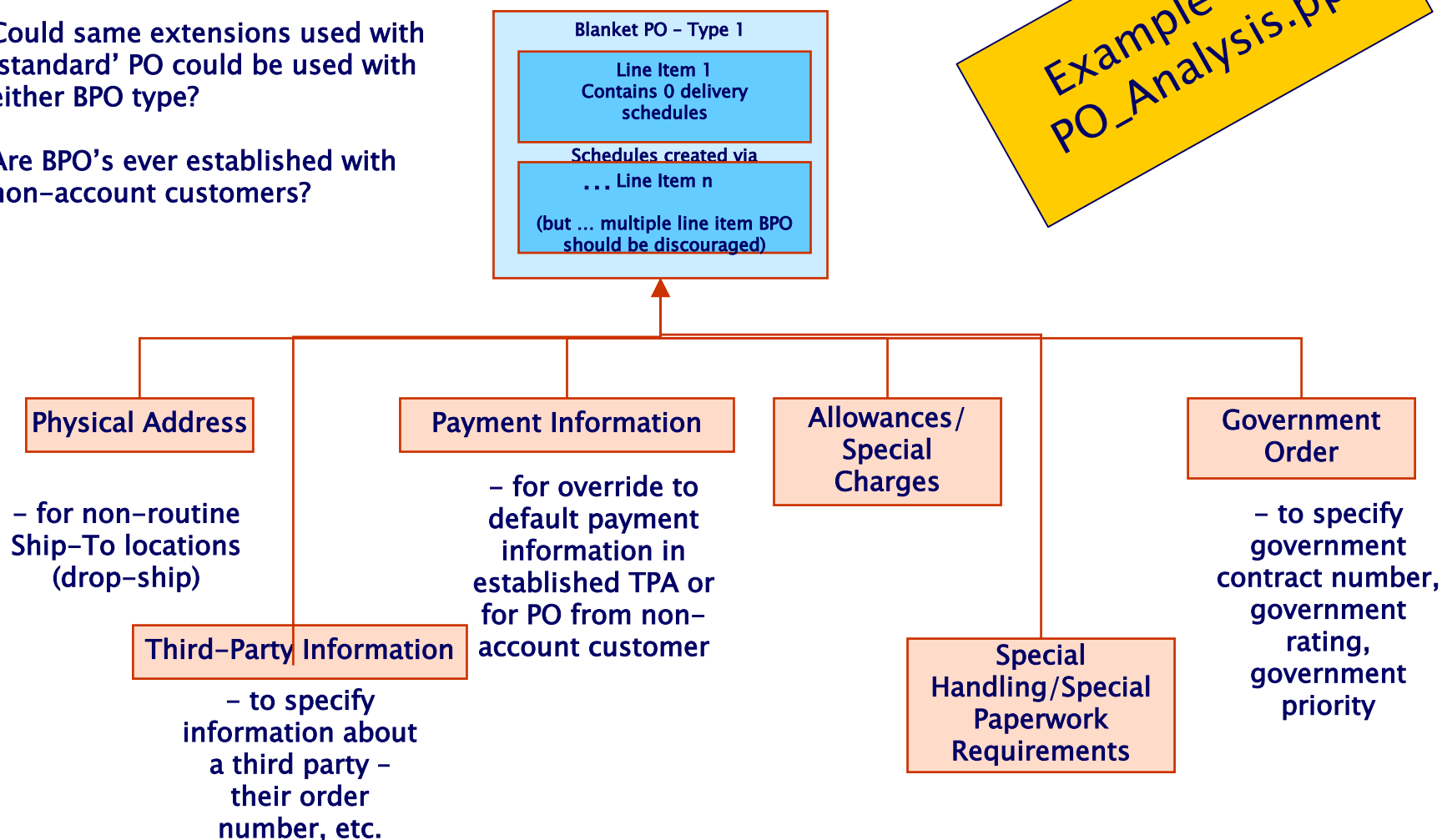


Extensions with other Cores

Could same extensions used with 'standard' PO could be used with either BPO type?

Are BPO's ever established with non-account customers?

Example from
PO_Analysis.ppt





Completion/Handoff

- } When worksheets are completed, hand off to CompTIA to be converted and incorporated into web site
- } What else?